

INFORMATION BULLETIN

WELFARE-TO-WORK

Employment Development Department

Number: WB00-42

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TO: LOCAL WORKFORCE INVESTMENT AREAS
WELFARE-TO-WORK 15 PERCENT SUBGRANTEES
DOL WELFARE-TO-WORK 25 PERCENT SUBGRANTEES
COUNTY WELFARE DIRECTORS
CALIFORNIA DEPARTMENT OF SOCIAL SERVICES STAFF
EDD EXECUTIVE STAFF
WID STAFF

SUBJECT: WELFARE-TO-WORK (WTW) PARTICIPANT TRANSFERS

The purpose of this information bulletin is to provide instructions to users of the Job Training Automation (JTA) system on transferring WtW participants between funding sources or between program types within the same funding source.

Changes were made to the JTA system in April 2000 to allow 85 percent subgrantees to transfer participants from the first year funding allocation (grant code 800) to the second year funding allocation (grant code 801) using a new termination code (code 15). These changes were included in Information Bulletin WB00-17, *JTA System Version 3.25.0 Release*, dated April 7, 2000. Subgrantees who have expended their first year allocation (grant code 800) may transfer continuing participants to their second year allocation (grant code 801) using the following procedures.

Transfer Participants from Grant Code 800 to 801:

1. Complete a Termination form (EWTF) using the termination code 15.
2. Complete a new Enrollment form (EWEF) using the enrollment code 3 (concurrent/transfer enrollment). A new case number will be assigned to the participant.
3. Complete a new Monthly Activity Record (EMAF) to track the participant's activities under the new case number in Grant 801.
4. If and when there is a change in the participant's employment status under grant 801, complete a new Employment Record (EWER).

The JTA system Version 3.25.0 release also included changes to allow for the transfer of participants from the 30 percent eligibility provision to the 70 percent eligibility provision within the same funding source. A new termination code (code 16) was added to provide a means of tracking the expenditures and activities associated with each enrollment. Participants who were eligible under the 30 percent provision at the time of their initial enrollment but are now eligible under the 70 percent provision may be transferred using the following procedures.

Transfer Participants From 30 Percent to 70 Percent Within the Same Grant Under the Same Rules Of Eligibility:

1. Delete any entries made on the Monthly Activity Record (EMAF) after the effective date of the change. Begin with the most recent data entered and work backwards.
2. Delete any employment data entered on the Employment Record (EWER) after the effective date of the change. Begin with the most recent data entered and work backwards.
3. Complete a Termination form (EWTF) using the termination code 16.
4. Update the Application/Registration form (EWRF) to indicate that the participant is eligible under the 70 percent provision.
5. Complete a new Enrollment form (EWEF) using the enrollment code 3 (concurrent/transfer enrollment). A new case number will be assigned to the participant.
6. Complete a new Monthly Activity Record (EMAF) to track the participant's activities under the 70 percent provision. If activities were entered on the Monthly Activity Record after the effective date of the change, those records will need (to be deleted reentered) under the 70 percent provision.
7. Complete a new Employment Record (EWER) to track the participant's employment under the 70 percent provision, if necessary. If entries were made on the Employment Record after the effective date of the change, those records will need to be reentered under the 70 percent provision.

These transfer procedures apply only to those participants whose eligibility status has actually changed from 30 percent to 70 percent during their enrollment in the program. There may also be a need to transfer participants who were originally misclassified as 30 percent eligible. These are participants who were initially enrolled under the 30 percent provision because information on barriers was not available or the length of California Work Opportunity and Responsibility to Kids Program (CalWORKs) assistance was miscalculated. If the operating entity later determines that the participant met the 70 percent provision at the time of their enrollment, the participant may be transferred using the following procedures.

Transfer Participants Misclassified as 30 Percent to 70 Percent Within the Same Grant:

1. Update the Application/Registration form (EWRF) with the correct information.
2. Change the participant's eligibility from B to AB and file the updated record.
3. Change the Program Type on the Enrollment Form (EWEF) from 2 to 1.

Subsequent modifications were made to the JTA system to allow for the enrollment of participants who meet the new eligibility criteria specified in the 1999 amendments to the WtW Grant program. New eligibility fields were added to the Application/Registration form (EWRF) to collect data required to determine eligibility under the new guidelines. A new Application form was issued in Information Bulletin WB00-36, *Revised WtW Application/Registration Form*, along with line-item instructions

for completing the new fields. The JTA system was modified to check eligibility for participants with an application date of July 1, 2000, and later using two new eligibility codes (codes C and D), refer to Information Bulletin WB00-35 dated July 28, 2000, *JTA System Version 4.04 Release*. **Any new individuals enrolled into the WtW Grant program beginning July 1, 2000, must be eligible under the new criteria.** However, in order to expend WtW Grant program funds prior to October 1, 2000, newly enrolled clients must meet both the old (preJuly 2000) and the new July 1, 2000) eligibility provisions. To ensure compliance with this requirement, the system was modified to calculate eligibility on both the new (C and D) and the old (A and B) criteria for individuals enrolled during the period from July 1, 2000, to September 30, 2000.

As a result of the changes in eligibility criteria under the new amendments, participants enrolled prior to July 1, 2000, under the old 30 percent provision may be eligible under the new 70 percent provision effective July 1, 2000. The JTA system has been modified to allow for the transfer of these participants from the old 30 percent provision to the new 70 percent provision in system release 4.06, refer to Information Bulletin WB00-41, dated September 15, 2000, *JTA System Version 4.06 Release*. This release allows participants to be transferred to the new 70 percent provision using the following procedures.

Transfer Participants From Old 30 Percent to New 70 Percent Within the Same Grant:

1. Delete any Monthly Activity Records (EMAF) with activities provided on or after July 1, 2000. Begin with the most recent data entered and work backwards.
2. Delete any Employment Records (EWER) with employment activity that occurred on or after July 1, 2000. Begin with the most recent data entered and work backwards.
3. Complete a Termination form (EWTF) using the termination code 16 to signify the transfer from 30 percent to 70 percent funding.
4. Update the Application/Registration form (EWRF) with new information to indicate that the participant is eligible under the new 70 percent provision. Instructions for completing the new eligibility fields were issued in Information Bulletin WB00-36, *Revised WtW Application/Registration Form* dated July 28, 2000. Change the eligibility field to include the new C or D eligibility.
5. Complete a new Enrollment form (EWEF) using the enrollment code 3 (concurrent/transfer enrollment). A new case number will be assigned to the participant.
6. Complete a new Monthly Activity Records (EMAF) to track the participant's activities under the new 70 percent provision. Activities entered on the Monthly Activity Record on or after July 1, 2000, will need to be re-entered under the new 70 percent provision.
7. Complete a new Employment Records (EWER) to track the participant's employment under the new 70 percent provision, if necessary. Entries made on the Employment Record on or after July 1, 2000, will need to be reentered under the new 70 percent provision.

The Monthly Participant Report (PWPR) was modified in April 2000 to display a count of participants transferred from grant 800 to grant 801 (termination code 15) and participants transferred from the 30 to 70 percent eligibility provision (termination code 16). Participants moved from one grant to another with termination code 15 would count as a participant served once for each grant code when this report is run. Participants moved from 30 to 70 percent within the same grant will count twice as a participant served once for each case. To obtain an accurate count of the total participants served from the report after these transfers have been made, the number of transfers made using termination code 16 must be subtracted. That is, the Total Participants Served minus the count of participants in Termination Code 16 will equal the actual number of participants served. This number is reported to the Department of Labor each quarter.

If you have technical questions related to the JTA system, please contact the JTA Help Desk, at (916) 653-0202. Questions pertaining to the new eligibility requirements may be directed to Lynora Sisk, at (916) 654-7854. Questions concerning WtW participant reporting may be directed to Ed Flores, at (916) 654-8298.

/S/ BILL BURKE
Chief